

# **3** **Navigation and Online Help**

## **Introduction to Navigation and Online Help**

Navigation is the term used to describe the process of moving through CMS Net Web. As you “navigate” through the system, you will access windows, view information, enter data, and update existing data.

This section will review the basic navigation functions in CMS Net Web, including the online help features. It will also explain how to get field description information from CMS Net Web Online Help.

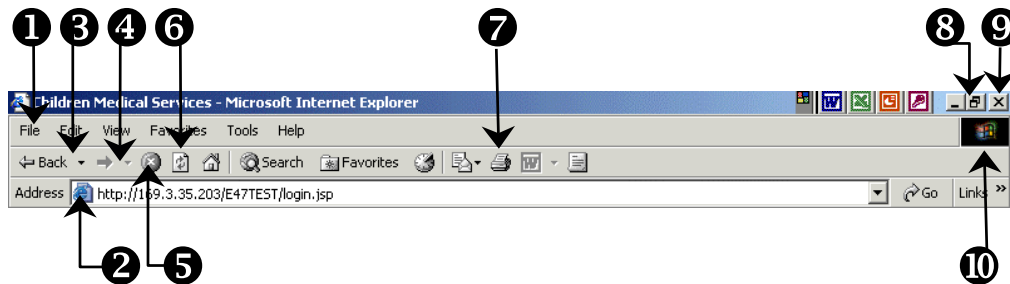
## **Objectives**

At the completion of this section, you will be able to:

- Use Internet Explorer’s Menu Bar
- Use CMS Net Web Menu Bar
- Be Familiar with CMS Net Web’s Navigation and Page Design
- Understand how to Save Information in CMS Net Web
- Understand how to Close a Page in CMS Net Web
- Understand how to Access CMS Net Web Online Help

### 3.1 Internet Explorer's Menu Bar

Here are some features of Internet Explorer, the web-browser used to access CMS Net Web.



1		File Menu: Allows the user to open new pages, close pages, and print what is viewable on the page.
2		Address Line: Shows the web page and the internet address of the page being viewed.
3		Back: Takes the user to the previously viewed page.
4		Forward: Takes the user to the next page (that has been viewed already)
5		Stop: Stops the event that is currently taking place.
6		Refresh: Reloads the page.
7		Print: Prints what is viewable on the page.
8		Minimize page: Reduces the size of the page.
9		Close: Removes the page from the screen.
10		"Busy Processing:" When this item is moving, the system is processing. When the item is stationary, the system is waiting for the user.



*We recommend that you do NOT use the "Back" button on your web-browser. The "Back" button will produce unpredictable results.*

## 3.2 CMS Net Web Menu Bar

The CMS Net Web menu bar is shown below. The menu bar is the same on every page. It is located directly below the CMS Net Web title bar.



The menu bar allows you to quickly move to different parts of the system. Your access to these areas will depend on the security profile assigned to you.

<b>Authorization:</b>	Takes the user to the SAR Inquiry Page to Search, View, Add, and Update SARs.
<b>Provider:</b>	Takes the user to the Provider Inquiry Page to Search, View, Add, and Update Provider information.
<b>Formulary:</b>	Takes the user to the Drugs Requiring Authorization and Medical Supply Search inquiry.
<b>Procedure Code:</b>	Takes the user to the Medical and Dental Procedure Code Search Inquiry.
<b>Administration:</b>	Takes the user to the administration pages. Only State System Administration staff may access.
<b>Reports:</b>	Takes the user to the reports pages.

### 3.3 CMS Net Web Navigation and Page Design

CMS Net Web uses a consistent “look and feel” as a way of helping you navigate between pages, enter data, and complete tasks. An understanding of the basics of navigation in the CMS Net Web will be helpful as you work in the system.

#### 3.3.1 Required Fields

In CMS Net Web, required fields indicate those fields that must be completed before you can save and exit the page. An asterisk to the right of the field name identifies that it is required.

County / Regional Office \*

If you attempt to save a page without entering in data in the required fields, an error message will appear as a pop-up box or on the top of the page in red. The user is taken to the first field that needs information.

#### 3.3.2 Tab Pages

When there is a large amount of data to be collected on a page, CMS Net Web uses tab pages to organize the information into logical groupings. A page with tabs will open with the first tab.

California Home | CDHS Home | CDHS Comments | CDHS Search | CDHS Organization | Thursday, April 8, 2004

**Children's Medical Services**  
Caring for Children with Special Medical Needs...

Contact Us | Help | Logout

Authorization | Provider | Formulary | Procedure Code | Administration | Reports

**NATHANIEL SMITH - Pending**

Authorize | Deny | Cancel | **Modify** | Extend | Delete | Print

**CLIENT INFORMATION**

Client Name:	NATHANIEL SMITH	F/R Elig:	ELIGIBLE	Reg Status:	ACTIVE
CCS Number:	3305032	Med Elig Status:	ELIGIBLE	Application Status:	SIGNED APP
DOB:	11/12/1997	Diagnostic Only:	No	PSA Status:	SIGNED
CIN:	97641843D8	CCS Elig Status:	9K CCS	Program Begin Date:	01/01/2004
Gender:	Male	County:	Placer	Program End Date:	12/31/2004

**PROVIDER INFORMATION**

Provider Name:	TETZLAFF, THOMAS R MD	Provider Number:	FS4901334
Address:	75 PRINGLE WAY, STE 801, RENO, NV, 89502-8400	County:	null

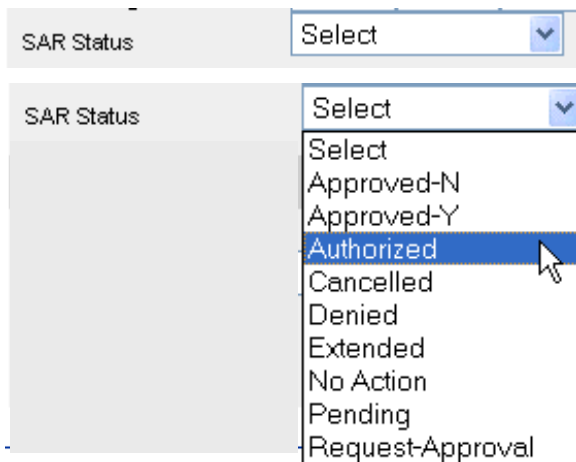
**SAR INFORMATION**

SAR Number:	97000000210	Request Date:	04/08/2004
Service Begin Date:	04/01/2004	Service End Date:	04/01/2004
No Of Days:	29	Payment County:	Placer
EPSDT-SS:	N	CCS-SS:	N
Category:	1093	State Approved:	

Click the tab label to go to this tab.

### 3.3.3 Drop Down Fields

CMS Net Web uses drop down fields when the field is supported by a reference table (or a picklist). Any field with a down arrow has values provided in a list. Click on the drop down or the arrow to view the list. Select a value by clicking your mouse on the desired value.



The image shows two instances of a drop-down menu. The top instance is a label 'SAR Status' next to a box containing 'Select' and a downward arrow. The bottom instance shows the same label and box, but the menu is open, displaying a list of options: 'Select', 'Approved-N', 'Approved-Y', 'Authorized' (highlighted with a mouse cursor), 'Cancelled', 'Denied', 'Extended', 'No Action', 'Pending', and 'Request-Approval'.

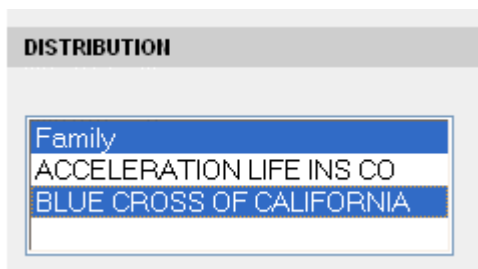
In most cases, drop down field values will be displayed alphabetically.



*You can select a value from the drop down list in a drop down field.  
You cannot enter free-form text in a drop down field.*

### 3.3.4 List Boxes

CMS Net Web uses a list box when the user may select multiple supplied values. For instance, on the Authorize, Extend, Cancel, and Deny SAR pages, a distribution list box appears on the page. The user may select one value, several values, or no values from this list box.



The image shows a list box titled 'DISTRIBUTION'. It contains three items: 'Family', 'ACCELERATION LIFE INS CO', and 'BLUE CROSS OF CALIFORNIA'. The 'Family' item is highlighted with a blue background.

To select multiple values from this distribution list box, hold down the “ctrl” key on the keyboard and click the selection(s) with the mouse.

### 3.3.5 Commonly Used Buttons in CMS Net Web

#### **The New button**

The **New** button clears the fields on the page and prepares the page to receive new information. Once you enter in the information on the page, click the **Save** button.

#### **The Undo button**

The **Undo** button removes the data that has been entered on the page. This action will reset all fields to their default (or last saved) values; it discards pending changes. It will *not* undo a transaction that has been saved.

#### **The Save Button**

As you enter or update information in CMS Net Web, it is important to make sure that the modifications have been saved to the CMS Net Web database. When you have completed a page or a tab on a page, click the **Save** button on the page. This will save the information from the page to the database.



*If you attempt to close the page without saving the data you have entered or updated, CMS Net Web will close the page and your updates will be discarded.*

### 3.3.6 Closing a Page

To close a page, click on the X located in the upper right hand corner of the page or you can click on Close on Internet Explorer's File Menu bar.



*If you close the page without saving the data you have entered, you will lose the information and the page will close*

### 3.4 CMS Net Web Online Help

#### Notes

CMS Net Web Online Help consists of page help and field help. Page help explains the purpose of the page or tab. Field help provides a definition of each field on the page or tab. An example of an online help page is provided below for the Provisional Approved Providers Report page.

